

### Employment Summary for Tigard's Urban Renewal District

Tigard's Urban Renewal District is currently home to more than 176 firms, employing more than 1,700 residents from around the region. The average salary of an employee in the Tigard Urban Renewal District in 2014 was \$43,268. Combined, firms in Tigard's Urban Renewal District expensed over \$75 million in payroll in 2014. Tigard's Urban Renewal District sits between two industrial zones (outside of the urban renewal district) with another 61 firms employing more than 600 people in manufacturing, distribution and traded sector occupations. Daily more than 4,000 commuters make a transit trip via the Tigard Transit Center primarily as they commute to work somewhere else in the region or into Tigard for their job.

### Types of Jobs in Tigard's Urban Renewal District

Covering only 198 acres, this general commercial area supports a mix of firms/employers. A diverse mix of businesses provides employment options for residents with a range of skills, education levels, interests and earning potential. The table shows the mix of industries employing people in Tigard's Urban Renewal District compared to employment in the city overall.

The orange highlighted business sectors on the table show the percentage of employees in Tigard's Urban Renewal District that work for a firm with a primarily consumer focus.

Consumer services like retail trade, entertainment, food service and general/other services (shoe repair, barber, car mechanics) are the retail amenities that most residents expect to find in an "urban village" downtown format. These businesses are typically the first floor tenants serving a local customer base with retail goods and service, often on evenings and weekends. Firms in the consumer services sector employ 35% of the workforce in Tigard's Urban Renewal District.

Employment by Business Sectors 2013	Tigard	
	URD	City Wide
Agriculture, Forestry, Fishing and Hunting	0.7%	0.1%
Mining, Quarrying, and Oil and Gas Extraction	0.0%	0.0%
Utilities	0.0%	0.1%
Construction	2.3%	6.2%
Manufacturing	8.9%	5.4%
Wholesale Trade	1.6%	6.3%
Retail Trade	16.5%	16.9%
Transportation and Warehousing	0.0%	1.3%
Information	7.2%	3.3%
Finance and Insurance	6.1%	13.2%
Real Estate and Rental and Leasing	0.6%	1.3%
Professional, Scientific, and Technical Services	2.7%	9.1%
Management of Companies and Enterprises	0.0%	1.5%
Administration & Support	4.9%	14.8%
Educational Services	0.8%	3.8%
Health Care and Social Assistance	9.7%	6.1%
Arts, Entertainment, and Recreation	0.2%	1.2%
Accommodation and Food Services	9.9%	5.7%
Other (Consumer) Services	8.1%	2.7%
Public Administration	19.7%	1.2%

In order to support this type of business activity, a downtown also needs a healthy mix of office employment like finance and insurance, professional services, management, creative services and administration. These are business sectors (marked in blue in the table) that may have some interaction with retail customers (like an insurance office, or interior design firm). Employees at these firms also shop, eat and seek out services in a downtown. Firms with a large number of office employees account for 41% of the workforce in Tigard's Urban Renewal District.

In a typical urban village downtown format, firms specializing in manufacturing, warehousing, and wholesale trade are atypical in the core. Their physical footprint and the infrastructure they need run counter to a pedestrian oriented consumer focused urban village. In many downtowns, this business activity takes place on the edge of the district.

A mix of firms and business sectors and a higher density of employment are important factors to consider when thinking about Tigard's Urban Renewal District. Every employee downtown is a potential customer for a range of downtown goods and services.

### Large Employment Sectors in Tigard's Urban Renewal District

Employment in the eight largest business sectors for Tigard's Urban Renewal Districts can be compared to Sherwood and Beaverton's URD and the City of Tigard overall in the table below. These 8 business sectors account for 86% of all employment in the Tigard Urban Renewal District. These same business sectors only represent 54% of the employment capacity of the entire workforce in the city overall. Employment in Tigard's Urban Renewal District is highly concentrated in these sectors.

Retail and commercial trade (retail, restaurants and consumer services) make up the largest private sector source of employment in the Tigard Urban Renewal District. Combined, firms in these consumer oriented businesses provide jobs to 35% of all employees who work in Tigard's Urban Renewal District.

<b>Largest Employment Sectors (2013)</b>	<b>Tigard URD</b>	<b>Beaverton URD</b>	<b>Sherwood URD</b>	<b>City of Tigard</b>
	<b>Share</b>	<b>Share</b>	<b>Share</b>	<b>Share</b>
Manufacturing	8.9%	14.3%	16.8%	5.4%
Retail Trade	16.5%	22.7%	21.6%	16.9%
Information	7.2%	4.2%	0.6%	3.3%
Finance and Insurance	6.1%	2.2%	3.0%	13.2%
Health Care and Social Assistance	9.7%	9.1%	13.8%	6.1%
Accommodation and Food Services	9.9%	14.2%	11.6%	5.7%
Other (Consumer) Services	8.1%	3.4%	6.7%	2.7%
Public Administration	19.7%	4.7%	4.4%	1.2%
Listed as a percentage of Total	86.1%	74.8%	78.4%	54.4%

In almost each instance, the same business sectors in Sherwood and Beaverton's urban renewal districts employ a larger percentage of people. Tigard's Urban Renewal District has a relatively large share of public administration jobs due to City Hall's location downtown, which reduces the proportion of private sector employment. Tigard City Hall (Public Administration 19.7%) makes up the single largest employer in Tigard's Urban Renewal District.

Tigard's Urban Renewal district supports 8.3 employees per acre. City wide, employment per acre is 20 when counting all employment lands. (Lincoln Center accounts for a high density per acre calculation when looking at the city overall.) For comparison sake, The City of Sherwood's urban renewal district currently employs 5.3 people per acre on 411 acres of urban renewal district. Beaverton's Urban Renewal District employees 13.6 people per acre in a 988 acre district.

Tigard's Urban Renewal District supports a mix of employees working in a range of business sectors that support an urban village downtown format. Proportionally more office based employees work in information services, finance, public administration and insurance in Tigard's Urban Renewal District than in Beaverton and Sherwood's Urban Renewal Districts and the City overall.

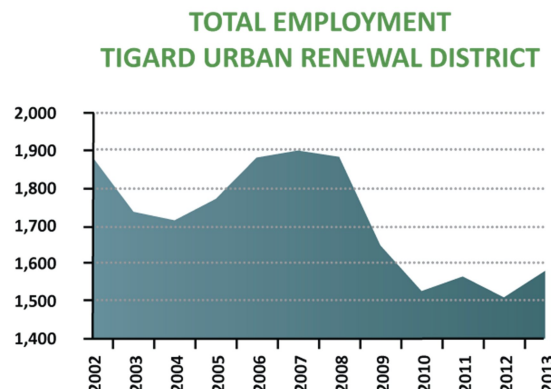
The employment mix in Tigard's Urban Renewal District is not limiting the ability of the district to mature into an urban village downtown format. The mix of business activity and employment is balanced but underrepresented in key urban village shopping district commercial activities like retail sales and restaurants.

### Employment Trends in Tigard's Urban Renewal District

In 2007 at "peak employment" 1,900 people worked in Tigard's Urban Renewal District. By 2013 (the most current year of data) employment dropped to 1,600 employees. Employment is up slightly from a post-recession low of 1,500 in 2012. Over the same time period, city-wide employment rose from 35,300 in to 41,079 employees in 2014.

From 2002 to 2013, Tigard's Urban Renewal District has seen a decrease in the number of people working within the district. Downtown's overall decrease in employment of 16% is counter to a city-wide increase in employment of 16% since 2002.

At "peak employment" firms located in Tigard's Urban Renewal District employed 5.33% of the City of Tigard's workforce. Currently, firms in the Urban Renewal District employ 3.8% of the overall workforce. This annualized decrease in workforce by sector equates to a loss of 300 jobs or 16% of the employees working in Tigard's Urban Renewal District.



Area of Study	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	Percent Change
Jobs URD	1,883	1,737	1,714	1,771	1,881	1,900	1,883	1,648	1,526	1,565	1,509	1,580	-16.09%
Jobs Tigard	35,341	34,342	35,306	35,971	37,333	38,550	38,553	36,059	36,988	39,975	40,090	41,079	16.24%
Tigard Population	44,609	44,828	45,724	46,709	47,657	47,916	48,528	49,254	48,035	49,025	49,774	50,000	12.09%

The chart to the right shows which business sectors are expanding and contracting their workforce in Tigard's Urban Renewal District. Food services, healthcare and financial/insurance services are increasing. Every other business sector represented in the table has been reducing its workforce.

Decreased employment indicates lower businesses activity for these sectors. These firms may be reducing their workforce but operating out of the same space, moving to another location, or closing. Unusual for Tigard's Urban Renewal Districts is the widespread trend in decreasing employment, not limited to just a few sectors.

Business Sector Change in Employment Over Time (Targeted Sectors)	Annualized 2002-2013
Manufacturing	-2.5%
Wholesale Trade	-4.6%
Retail Trade	-1.3%
Transportation and Warehousing	-9.1%
Information	-2.9%
Finance and Insurance	7.2%
Professional, Scientific, and Technical Services	-4.4%
Management of Companies and Enterprises	-9.1%
Administration & Support	-4.3%
Health Care and Social Assistance	6.3%
Arts, Entertainment, and Recreation	-6.6%
Accommodation and Food Services	8.4%
Other (Consumer) Services	0.9%
Public Administration	0.6%

The trend in increasing food service downtown is one good signal. Increased restaurant and food offerings in a downtown setting set the stage for retail and residential uses.

Employment levels in Tigard's Urban Renewal District are not increasing along with the overall trend. The district should be able to support at least 20% more employees than currently. As employment decreases in business sectors that need large amounts of space like warehousing, wholesale trade and manufacturing, empty capacity should be converted to use for activities that support higher densities of employment and other uses valued by the community. Prioritizing for first-story consumer oriented business activities with upper story office and residential uses supports an urban village style form.

## What do employees working in Tigard's Urban Renewal District Earn?

Wages paid to employees in Tigard's Urban Renewal District are divided into three categories by the US Census.

- Less than \$15,000/year (\$1,250/month)
- Between \$15,000 and \$40,000 per year
- More than \$40,000/year (\$3,333/month)

The trend in wages follows a national and city-wide trend of a decrease in middle income earners and increases in lower wage and higher wage positions. Since 2002, the number of employees in the middle range earning \$15,000 to \$40,000 per year in Tigard's Urban Renewal District has decreased by 35%.

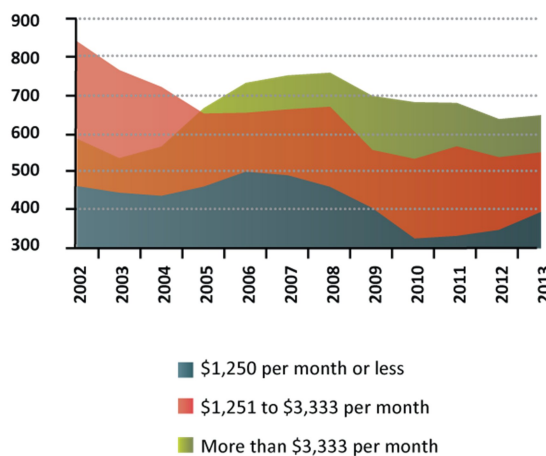
Since the end of the recession in 2010, in Tigard's Urban Renewal District, the trend shows a slight decrease in the number of employees earning more than \$3,333 per month (\$40,000/yr). The number of employees working in low wage jobs (less than \$15,000/yr) in Tigard's Urban Renewal District has increased the most dramatically since the end of the recession in 2010. In recent years, employment in low wage jobs has increased by 22% in Tigard's Urban Renewal District. Higher wage employment (\$15,000 and above) has decreased by 1% and while it's lower than pre-recession levels, it is trending up.

This trend in Tigard's Urban Renewal District is not consistent with the trend in Beaverton and Sherwood's Urban Renewal Districts. In Sherwood, the number of employees entering the relatively higher income cohorts is growing (with a 23% increase from 2010 to 2013) and the low wage group is shrinking (11% decrease). The disbursement of wages in Beaverton has been relatively constant between the three categories.

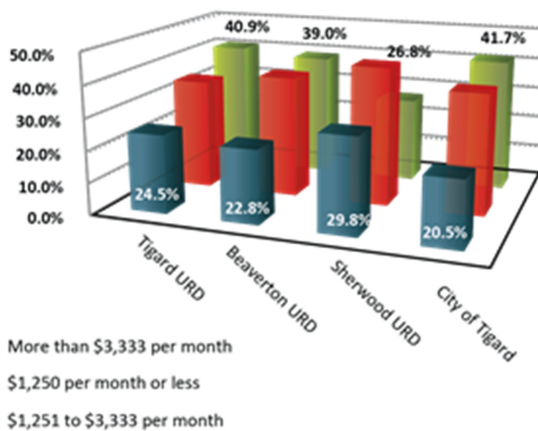
For comparison, at the end of calendar year 2014, the average wage for an employee in Tigard was \$47,968 (\$4,000/month). Contrary to the trend in the Tigard Urban Renewal District, when looking across the whole City of Tigard, the trend shows a 45% increase in the number of employees making more than \$3,333 per month and only a 3.5% increase in the lowest wage group earning less than \$1,250/month (\$15,000 yr.)

As property owners and business owners reinvest in Tigard's Urban Renewal District creating more retail and restaurant offerings, the age of the workforce, education level and wages paid will continue to decline. This can be balanced by ensuring office capacity on upper stories and less pedestrian/consumer oriented activities around the edges of Tigard's Urban Renewal District as it transitions into neighboring industrial zones.

**PAY RANGES OF EMPLOYEES  
TIGARD URBAN RENEWAL DISTRICT**



**2013 WAGES BY STUDY AREA  
TIGARD URBAN RENEWAL DISTRICT**



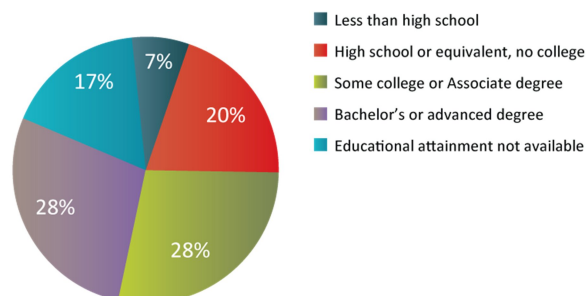
## Employee Education and Age in Tigard's Urban Renewal District

The education level of employees in Tigard's Urban Renewal District follows the trend in wages. In Tigard's Urban Renewal District an increasing number of employees have a high school education or less. This group accounts for 27% of the urban renewal district's workforce. Sherwood and Beaverton Urban Renewal Districts have a similar proportional share of minimally educated employees. The trend is consistent with city-wide trends in education levels.

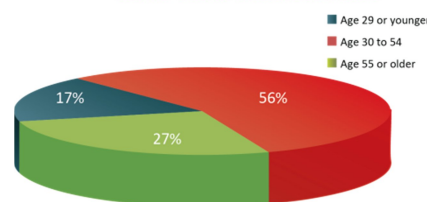
Inconsistent with city-wide trends, the number of employees in Tigard's Urban Renewal District with at least a bachelor's degree decreased by 9.9% since 2009. City wide, the proportion of employees with a high school education or less is about the same at 25% and the number with at least a bachelor's degree has increased by 8.8%. Education data from the US Census is only available from 2009 to 2013.

Wages, education Level and age are often correlated. The majority of Tigard's urban renewal district employees (56.2%) are in their primary earning years age 30 to 54. This "working age" group is about the same proportion in the Beaverton and Sherwood urban renewal districts. The proportion of this group related to the younger and older working demographic is true for the city overall as well.

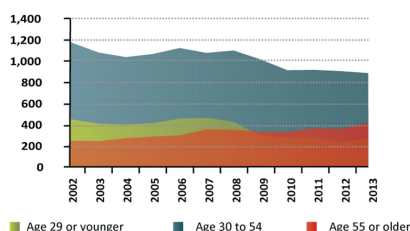
**WORKFORCE EDUCATION LEVEL 2013  
TIGARD URBAN RENEWAL DISTRICT**



**WORKFORCE BY AGE  
TIGARD URBAN RENEWAL DISTRICT**



**EMPLOYMENT BY AGE  
TIGARD URBAN RENEWAL DISTRICT**

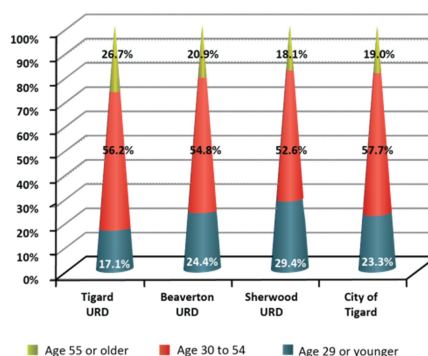


Also, like national trends, the workforce is aging, and since the end of the recession employees with experience have crowded out job opportunities for younger employees.

Just of a quarter (26%) of the employees in the Tigard Urban Renewal District are older than age 55. This age group has increased about 69% since 2002

in and increased 84% city wide. Only 17% of the Tigard urban renewal district's employees are 29 years old or younger, this group has seen the largest decrease of about 40%. This groups makes up anywhere from 23 to 29% of the employees in Beaverton and Sherwood's urban renewal district and the City overall.

**COMPARISON OF  
WORKFORCE BY AGE**



### Workforce Trend Summary

- Firms in consumer services (retail, restaurant, product repair, and entertainment) employ 35% of the workforce in Tigard's Urban Renewal District.
- Firms with a large number of office based employees account for 41% of the workforce in Tigard's Urban Renewal District. Businesses in this sector include professional services and public administration.
- Eight industries account for 86% of the employment opportunity in Tigard's Urban Renewal District. Employment in the URD is concentrated and less diverse compared to city-wide employment.
- Tigard's Urban Renewal District supports 8.3 employees per acre. City wide, employment per acre is 20 when counting all employment lands. (Lincoln Center accounts for a high density per acre calculation when looking at the city overall.)
- In 2007 at "peak employment" 1,900 people worked in Tigard's Urban Renewal District. Overall employment in the URD decreased 16%. This is counter to a city-wide increase in employment of 16% since 2002.
- The workforce employed by firms in the food service industry (+8%), insurance (+7%) and healthcare (+6%) has increased, while the workforce in other industries in the URD has decreased since 2002.
- The trend in wages follows a national and city-wide trend of a decrease in middle income earners and increases in lower wage and higher wage positions. Since 2002, the number of employees in the middle range earning \$15,000 to \$40,000 per year in Tigard's Urban Renewal District decreased 35%.
- The number of employees working in low wage jobs (less than \$15,000/yr) in Tigard's Urban Renewal District increased by 22% post-recession.
- In Tigard's Urban Renewal District an increasing number of employees have a high school education or less. This group accounts for 27% of the urban renewal district's workforce.
- Inconsistent with city-wide trends, the number of employees in Tigard's Urban Renewal District with at least a bachelor's degree decreased by 9.9%. For the city overall, the number of employees with at least a bachelor's degree has increased by 8.8%.
- The majority of Tigard's urban renewal district employees (56.2%) are in their primary earning years age 30 to 54. Similar to the national trend, the workforce is aging, and since the end of the recession, employees with experience have crowded out job opportunities for younger employees.
- About a quarter (26%) of the employees in Tigard's Urban Renewal District are older than age 55. This age group has increased about 69% since 2002. Only 17% of the Tigard urban renewal district's employees are 29 years old or younger, this group has seen the largest decrease of about 40%.